

Thinking about legacy, how important are the following financial priorities to you? -
 Passing along money to my family

	Total	Retired (retired + semi- retired)	All others
		F	G
Base: All Respondents (unwtd)	1250	377	873
Base: All Respondents (wtd)	1250	371	879
Top 2 Box (Net)	874	260	614
	70%	70%	70%
Very important	369	116	252
	29%	31%	29%
Somewhat important	505	143	361
	40%	39%	41%
Bottom 2 Box (Net)	376	112	265
	30%	30%	30%
Not very important	235	56	178
	19%	15%	20%
Not at all important	142	55	86
	11%	15%	10%
		G	
Sigma	1250	371	879
	100%	100%	100%

Thinking about legacy, how important are the following financial priorities to you? -
 Ensuring my estate is taxed as little as possible so my family receives a larger inheritance

	Total	Retired (retired + semi- retired)	All others
		F	G
Base: All Respondents (unwtd)	1250	377	873
Base: All Respondents (wtd)	1250	371	879
Top 2 Box (Net)	954	290	664
	76%	78%	76%
Very important	464	175	289
	37%	47%	33%
		G	
Somewhat important	489	115	374
	39%	31%	43%
			F
Bottom 2 Box (Net)	296	81	215
	24%	22%	24%
Not very important	188	46	142
	15%	12%	16%
Not at all important	109	36	73
	9%	10%	8%
Sigma	1250	371	879
	100%	100%	100%

Thinking about legacy, how important are the following financial priorities to you? -
 Ensuring my family receives money quickly so they aren't paying out-of-pocket for
 my funeral and other end-of-life expenses

	Total	Retired (retired + semi- retired)	All others
		F	G
Base: All Respondents (unwtd)	1250	377	873
Base: All Respondents (wtd)	1250	371	879
Top 2 Box (Net)	1025	305	720
	82%	82%	82%
Very important	516	170	346
	41%	46%	39%
Somewhat important	509	135	374
	41%	36%	43%
Bottom 2 Box (Net)	225	66	159
	18%	18%	18%
Not very important	133	32	101
	11%	9%	11%
Not at all important	91	34	58
	7%	9%	7%
Sigma	1250	371	879
	100%	100%	100%

How knowledgeable are you about the following insurance policies? - Term Life Insurance

	Total	Retired (retired + semi- retired)	All others
		F	G
Base: All Respondents (unwtd)	1250	377	873
Base: All Respondents (wtd)	1250	371	879
Top 2 Box (Net)	625	176	449
	50%	47%	51%
Very knowledgeable	157	41	117
	13%	11%	13%
Somewhat Knowledgeable	468	135	333
	37%	36%	38%
Bottom 2 Box (Net)	625	196	429
	50%	53%	49%
Not very knowledgeable	407	128	279
	33%	35%	32%
Not at all knowledgeable	218	67	151
	17%	18%	17%
Sigma	1250	371	879
	100%	100%	100%

How knowledgeable are you about the following insurance policies? - Universal Life Insurance

	Total	Retired (retired + semi- retired)	All others
		F	G
Base: All Respondents (unwtd)	1250	377	873
Base: All Respondents (wtd)	1250	371	879
Top 2 Box (Net)	497	106	391
	40%	29%	45%
			F
Very knowledgeable	111	26	85
	9%	7%	10%
Somewhat Knowledgeable	386	80	306
	31%	21%	35%
			F
Bottom 2 Box (Net)	753	265	487
	60%	71%	55%
		G	
Not very knowledgeable	460	160	300
	37%	43%	34%
		G	
Not at all knowledgeable	293	106	188
	23%	28%	21%
		G	
Sigma	1250	371	879
	100%	100%	100%

How knowledgeable are you about the following insurance policies? - Whole Life Insurance

	Total	Retired (retired + semi- retired)	All others
		F	G
Base: All Respondents (unwtd)	1250	377	873
Base: All Respondents (wtd)	1250	371	879
Top 2 Box (Net)	625	172	453
	50%	46%	52%
Very knowledgeable	139	40	99
	11%	11%	11%
Somewhat Knowledgeable	485	131	354
	39%	35%	40%
Bottom 2 Box (Net)	625	200	425
	50%	54%	48%
Not very knowledgeable	396	124	272
	32%	33%	31%
Not at all knowledgeable	229	75	153
	18%	20%	17%
Sigma	1250	371	879
	100%	100%	100%

How knowledgeable are you about the following insurance policies? - Segregated Funds

	Total	Retired (retired + semi- retired)	All others
		F	G
Base: All Respondents (unwtd)	1250	377	873
Base: All Respondents (wtd)	1250	371	879
Top 2 Box (Net)	283	53	230
	23%	14%	26%
			F
Very knowledgeable	79	18	61
	6%	5%	7%
Somewhat Knowledgeable	204	35	169
	16%	10%	19%
			F
Bottom 2 Box (Net)	967	318	649
	77%	86%	74%
		G	
Not very knowledgeable	479	141	338
	38%	38%	38%
Not at all knowledgeable	488	177	311
	39%	48%	35%
		G	
Sigma	1250	371	879
	100%	100%	100%

How knowledgeable are you about the following insurance policies? - Payout Annuities

	Total	Retired (retired + semi- retired)	All others
		F	G
Base: All Respondents (unwtd)	1250	377	873
Base: All Respondents (wtd)	1250	371	879
Top 2 Box (Net)	392	106	286
	31%	29%	33%
Very knowledgeable	80	20	61
	6%	5%	7%
Somewhat Knowledgeable	312	87	226
	25%	23%	26%
Bottom 2 Box (Net)	858	265	593
	69%	71%	67%
Not very knowledgeable	487	146	341
	39%	39%	39%
Not at all knowledgeable	371	118	252
	30%	32%	29%
Sigma	1250	371	879
	100%	100%	100%

How knowledgeable are you about the following insurance policies? - Disability Insurance

	Total	Retired (retired + semi- retired)	All others
		F	G
Base: All Respondents (unwtd)	1250	377	873
Base: All Respondents (wtd)	1250	371	879
Top 2 Box (Net)	713	182	531
	57%	49%	60%
			F
Very knowledgeable	147	40	108
	12%	11%	12%
Somewhat Knowledgeable	565	142	423
	45%	38%	48%
			F
Bottom 2 Box (Net)	537	189	348
	43%	51%	40%
		G	
Not very knowledgeable	375	129	246
	30%	35%	28%
Not at all knowledgeable	162	60	102
	13%	16%	12%
Sigma	1250	371	879
	100%	100%	100%

Please select the statements that apply to you.

	Total	Retired (retired + semi- retired)	All others
		F	G
Base: All Respondents (unwtd)	1250	377	873
Base: All Respondents (wtd)	1250	371	879
I am the person who primarily manages finances in my household	563 45%	182 49%	381 43%
I wish I had had more conversations about money and estate planning before someone I loved was gone	182 15%	23 6%	159 18%
I am planning to leave an inheritance	420 34%	166 45%	254 29%
I anticipate I will receive an inheritance and depend on it financially	113 9%	20 5%	93 11%
I've received an inheritance	219 18%	112 30%	107 12%
I was confident about what to do with an inheritance I received	207 17%	92 25%	115 13%
I was overwhelmed by financial options for what to do with an inheritance I received	58 5%	8 2%	49 6%
I have an established estate plan in place	182 15%	89 24%	93 11%
I anticipate outliving my spouse	139 11%	51 14%	88 10%
I don't want to leave a financial burden for my family after I'm gone	667 53%	208 56%	459 52%
None of the above	164 13%	40 11%	125 14%
Sigma	2913 233%	991 267%	1922 219%

Please select the statements that apply to you:

	Total	Retired (retired + semi- retired)	All others
		F	G
Base: All Respondents (unwtd)	1250	377	873
Base: All Respondents (wtd)	1250	371	879
I have identified my financial needs for retirement, including potential healthcare costs, inflation and unexpected expenses	254	103	151
	20%	28%	17%
		G	
In retirement, I may need additional revenue streams or supplemental income beyond my retirement savings	274	59	215
	22%	16%	24%
		F	
I am confident that I will have enough money throughout my retirement to be able to afford the lifestyle I'd like to lead	398	174	224
	32%	47%	25%
		G	
I believe I need life insurance in retirement	211	48	163
	17%	13%	19%
I have set aside money or have life insurance to pay for final expenses, including funeral costs, managing property until it is sold and settling my estate	354	141	213
	28%	38%	24%
		G	
I have consumer debt (loans, line of credit, etc.)	366	86	281
	29%	23%	32%
		F	
I own my home and no longer have mortgage payments	311	179	132
	25%	48%	15%
		G	
I am able to max out my RRSP contributions every year	145	49	96
	12%	13%	11%
I am able to max out my TFSA contributions every year	218	104	114
	17%	28%	13%
		G	
I financially support family outside of my immediate household (e.g., parents, relatives)	153	27	126
	12%	7%	14%
		F	
None of the above	217	48	168
	17%	13%	19%
		F	
Sigma	2901	1019	1882
	232%	274%	214%